POST 9/11 GI BILL

EFFECTIVE 01 AUGUST 2009

POST 9/11 GI BILL

- The new GI Bill becomes effective 01 August 2009 – any class / program taken before that date is not covered under the new legislation.

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- Who is eligible?

Any Servicemember who was on active Duty for 90 days or more after 10Sep01 (Officers AND Enlisted)

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- The amount of tuition and stipends paid under the Post 9/11 GI Bill will vary depending on your state of residence, number of units taken, and amount of post Sept. 11, 2001 active-duty service. Here is a quick reference showing the percentage of total combined benefit eligibility based on the following periods of post 9/11 service
- 100% - 36 or more total months
- 100% - 30 or more consecutive days with Disability related Discharge.
- 90% - 30 total months
- 80% - 24 total months
- 70% - 18 total months
- 60% - 12 total months
- 50% - six total months
- 40% - 90 or more days

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- The Post 9/11 GI Bill offers several education assistance benefits. The three major benefits include up to 100% paid tuition, a monthly housing stipend, and a stipend of up to $1,000 a year for books and supplies. If you attend less than full-time you will receive a portion of the payment based on the number of units of study.
- Tuition and fee payments will be made to the school (of your choice) for all established charges. This payment is capped at the tuition and fees rate for the most expensive in-State undergraduate (Associates or Bachelors level courses) public college for the state of enrollment - this does not mean that you must atttend a public school. The amount of established charges payable for the entire quarter, semester, or term will be sent directly to the school as a lump sum payment. Individuals will receive the applicable percentage of the lesser of: Established charges *or h*ighest amount of established charges regularly charged undergraduate in-State students for full-time pursuit at a college or university.
- The monthly housing stipend will be paid based on the monthly basic allowance for housing (BAH) payable for a military member with dependents in pay grade E-5 residing in the same ZIP code for the school where the individual is enrolled. Active duty members, individuals training at ½ time or less, and individuals pursuing distance learning are not eligible for a housing stipend.
- You may receive a stipend of up to $1000 a year for books, supplies, etc. The individual will receive a lump sum payment in the first month of each quarter, semester, or term. The amount of the stipend payable is an amount equal to the fraction of the whole academic year that the quarter, semester, or term represents.

POST 9/11 GI BILL Example

- Individuals attending Private Benefits University (PBU) in Texas are charged $5,000 for full-time training each quarter. The highest in-State undergraduate tuition in Texas is $4,000 per quarter and the monthly housing allowance for the zip code that PBU resides in is $1000.
- Individuals who served at least 36 months on active duty (eligible for 100% of benefit) and who attend PBU full-time would receive—
- $4,000 for tuition and fees (paid directly to PBU);
- A monthly housing allowance of $1,000 per month (while pursuing training); and
- $250 book stipend for each quarter that the individual is enrolled.
- Individuals who served at least 24 months on active duty (eligible for 80% of benefit) and who attend PBU full-time would receive—
- $3,200 for tuition and fees (paid directly to PBU);
- A monthly housing allowance of $800 per month (while pursuing training); and
- $200 book stipend for each quarter that the individual is enrolled.

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- Additional benefits include the following, which are not charged against your 36 month entitlement:
  - Tutorial assistance may be paid up to **$100 per month**, not to exceed a total of **$1200**;
  - One licensing and certification test may be reimbursed, not to exceed the cost of the test up to a maximum of **$2000**; *and*
  - Work-study is authorized for individuals training at ¾ time or higher.
  - A one-time payment of **$500** for veterans using the Post 9/11 GI Bill to pursue a program of education if the claimant—
    - Resides in a county with 6 persons or less per square mile (as determined by most recent decennial Census); *and either*
    - Physically relocates at least 500 miles; *or*
    - Travels by air to physically attend an IHL if no other land-based transportation exists.

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- There is a limitation on Educational Assistance for Training Pursued at Half-time or Less and for Active Duty Members. If your attend training at ½ time or less you are not eligible for the monthly housing stipend. You are eligible for an appropriately reduced stipend for books. The amount of educational assistance payable is the applicable percentage mentioned earlier at a rate the lesser of:
- Established charges; *or*
- Highest amount of established charges regularly charged in-State undergraduate students for full-time pursuit at an in-State public college or university.

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- Active duty members are not eligible for the monthly housing stipend or for the book stipend. The amount of educational assistance payable is the lesser of the:
- Established charges; *or*
- The Top-up amount not covered by military tuition assistance.

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- Individuals eligible for a kicker (College Fund, Reserve Kicker) will remain eligible for such kicker under the Post 9/11 GI Bill. If eligible, you will be paid the kicker each month as an increase to your housing stipend, even on active duty. Although as an active duty service member, or a veterans training at ½ time or less, or you are pursuing distance learning, you will receive your monthly kicker payment.

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- You will not receive an increased amount for additional contributions ($600 buy-up) paid under chapters 30 or 1607 and you will not be refunded this amount under the Post 9/11 GI Bill.

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- MGIB (chapter 30) contributions (excluding $600 buy-up) will be refunded at a proportional amount [based on the number of months remaining under MGIB at time of Post 9/11 GI Bill (chapter 33) election] of the basic $1200 contribution. This refund will be included in the **last monthly stipend payment** when chapter 33 entitlement exhausts. Individuals who do not exhaust entitlement under chapter 33 will not receive a refund of contributions paid under MGIB.

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- Your eligibility to use the Post 9/11 GI Bill benefits expires 15 years from the date of the last discharge or release from active duty of at least 90 consecutive days.

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- in order to retain eligibility, after meeting the previously listed service requirements, you must:
- Be honorably discharged from Armed Forces; or
- Be released from Armed Forces with service characterized as honorable and placed on the retired list, temporary disability retired list, or transferred to the Fleet Reserve or the Fleet Marine Corps Reserve; or
- Be released from Armed Forces with service characterized as honorable for further service in a reserve component; or
- Be discharged or released from Armed Forces for—
  - A medical condition which existed prior to service (EPTS),
  - Hardship (HDSP), or
  - A condition which interfered with duty (CIWD); *or*
- Continue on active duty.

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- Like the MGIB you are generally entitled to 36 months of educational assistance. You may not receive benefits under more than one VA education program at the same time. If you are entitled to more than one GI Bill program you may be eligible for a maximum of 48 months of entitlement when using benefits under two or more GI Bill programs.
- **Note:** Individuals eligible under MGIB (Chapter 30) who elect to receive benefits under the Post 9/11 GI Bill are only entitled to the number of months they had remaining under MGIB (Chapter 30) (including any revoked months of transferred entitlement) up to a maximum of 36 months.

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- The Post 9/11 GI Bill differs in some ways from the MGIB when it comes to the types of programs that can be used. Under the Post 9/11 GI Bill you may receive educational and training assistance for any program of education that is approved under MGIB (chapter 30) **and offered by a college or university**. This includes vocational training programs that are offered by acredited colleges and universities only. However, if you were previously eligible for the MGIB, MGIB-SR (1606), or REAP (1607) you may continue to receive educational assistance for MGIB approved programs not offered by colleges and universities (i.e. flight, correspondence, APP/OJT, preparatory courses, and national tests).

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- You will no longer be eligible under the MGIB or other programs, after you elect to switch to the Post 9/11 GI Bill (chapter 33). Any contributions being made under MGIB (Chapter 30) will cease the month following the election.
- **NOTE**: If you elect to participate in the Post 9/11 GI Bill, you may use benefits under the MGIB, MGIB-SR, or REAP, if the type of educational assistance [flight, correspondence, APP/OJT, preparatory courses, and national tests] you wish to pursue is not available under chapter 33.

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- **Transferring Post 9/11 GI Bill Benefits**: The Department of Defense (DoD) is authorized to allow individuals who, on or after August 1, 2009, have served at least 6 years in the Armed Forces and **who agree to serve at least another 4 years** in the Armed Forces to transfer unused entitlement to their dependents (spouse, children). The Department of Defense may, by regulation, impose additional eligibility requirements and limit the number of months transferable to not less than 18 months.
- **Transfer of Unused Education Benefits Under MGIB (Chapter 30), 1606, or 1607 to Family Members.** The Department of Defense is authorized to allow individuals who have served at least 6 years in the Armed Forces and who **agree to serve at least another 4 years** in the Armed Forces to transfer unused entitlement to their dependents (spouse, children) under chapters 30, 1606, and 1607. The Department of Defense may, by regulation, impose additional eligibility requirements and limit the number of months transferable to not less than 18 months.
- **NOTE:** Although the transfer of entitlement provisions are effective as of June 30, 2008, DoD must develop regulations and provide VA with eligibility information before we can make payments under this provision. **The ability to transfer benefits is limited to those currently serving in the military**.

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- Under the new Post 9/11 GI Bill, you will have two options. First is to decline the Post 9/11 benefits and continue to use the MGIB. This is one reason why the new law included a 20 percent increase in the current MGIB (chapter 30) benefits.
- The other option is called the " Yellow Ribbon Program." Under the Yellow Ribbon Program, colleges and universities may voluntarily enter into an agreement with the Department of Veterans Affairs to fund up to 50 percent of the established charges not already covered under chapter 33. VA will match each additional dollar funded by the school. Only individuals entitled to the 100 percent benefit rate (based on service requirements) may receive this funding.
- Many veterans may face a difficult choice next year. You will need to carefully weigh your options. You may find that declining the Post 9/11 GI Bill and sticking to the MGIB will best serve your needs. Ultimately the choice is up to you, take your time and be sure to consider all the facts before making your decision. Remember, you have a year, and a lot can change between now and August 1, 2009.

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- Yes, effective August 1, 2008, the MGIB payment rate will be increased to $1,321 for full-time enrollment, a 20% increase over the 2007 rate.

ANY QUESTIONS?